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## OppMatch PUBLIC USER GUIDE 1.0

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Updated: 10/17/2012

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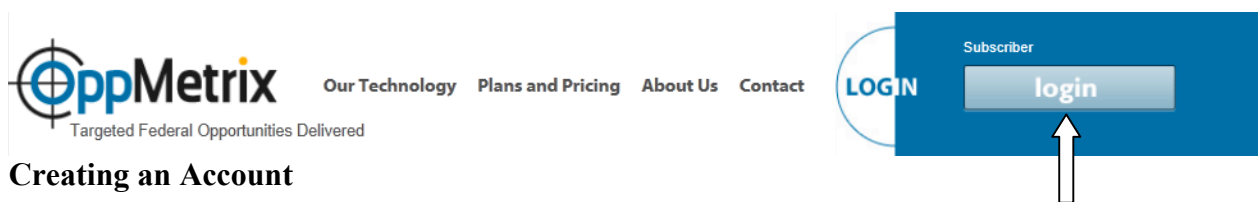
## Welcome to the OppMatch system!

Here at OppMetrix, we are pleased to work with an institution as distinguished as the University of North Texas Health Science Center. We are looking forward to helping you, the faculty members and researchers, identify the right public and private grants that will take your research funding to the next level.

The OppMatch system provides a way to quickly identify and accurately target grants that best fit your research. Our intelligent software solution matches your personalized profile to federal, state and private foundation grants and funding opportunities.

This user's guide will help you get started on your path to using the OppMatch system to its fullest potential.

## Getting Started



### Creating an Account

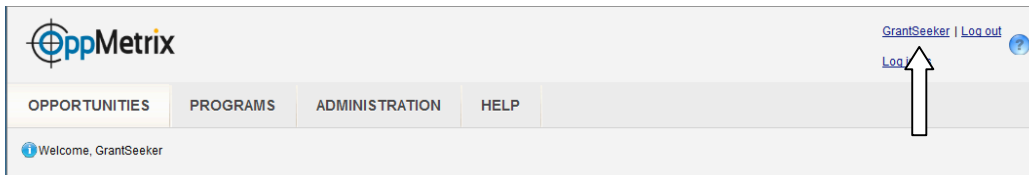
- Click on the Login icon at the top of the page ([www.oppmetrix.com](http://www.oppmetrix.com))
- A link there takes you to the Registration screen.
- Once there, fill out the information. When finished, click forward.
- The system sends two emails. The first is a thank you for registering. The second is a confirmation email. It contains your username and temporary password. Follow the link in this email.
- At the linked page, you can change and then confirm a permanent password. Then go to the login at the top right and log into the system.
- You will be met by a Welcome page, along with Terms of Use. If you agree to the terms, please accept the Terms of Use.
- You will arrive at your Account Page.

### Creating a Profile

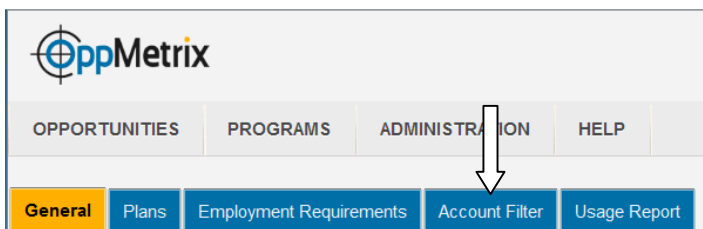
The most important step in the OppMatch system is building a detailed profile that reflects the research or service that you conduct and the types of grants that interest you. This profile acts like a magnet and attracts the best matches of available federal grant opportunities. OppMatch is a recommendation engine, placing the right match on the top of the pile.

To enhance, edit, or update your profile:

- Click on the username (GrantSeeker) icon at the top right of the screen.



- This will take you to the Individual Contractor Information page that contains basic identity and contact information.
- There is also a place on this page to upload your curriculum vitae (CV). By providing more information about your research, the CV creates better matches.
- Click on the Account Filter icon at the top of the box.



This will take you to your detailed Profile Page. The page will contain a series of questions and check box selections arranged in categories. The choices that you make on this page will create filters in the system that recommend the stronger opportunities and assign a lower rank to the weaker ones.

The page has two sections. The first section has several category fields to help filter opportunities, including the following:

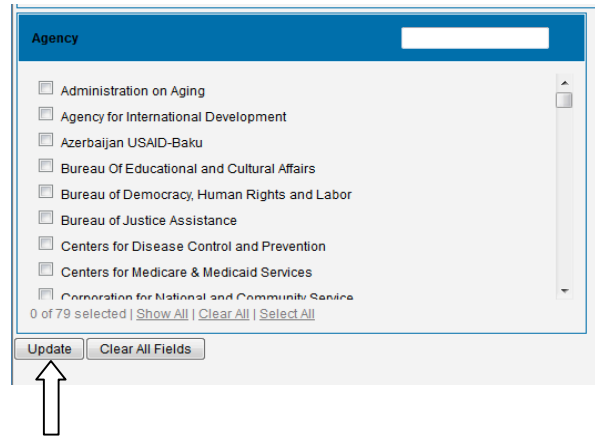
- Sources – Indicates the source of the opportunities that you are collecting.
- Associated Websites and Attachments – Locations where the OppMatch system can scan for keywords.
- Email notification – Lets you choose to receive or not receive email notifications for matching opportunities at user-defined frequencies. (A list is always available by logging into the system.)
- Score – The OppMatch portal operates a recommendation engine utilizing a dynamic scoring system. The highest score (best possible match) is a 100. In this entry field you can set the lowest score that interests you. It is pre-set for 50 but can easily be changed by entering a new number.
- Tags – Enter any common keywords that will help determine grants of interest.
- Search Radius (miles) – Enter the number of miles to filter opportunities.

The remainder of the profile is created by making selections in four categories based on factors that interest you. These categories are arranged in check boxes. You may check as many as apply. These categories are:

- Funding Categories – Narrows grants by subject (agriculture, transportation, etc.).
- Eligibility – Select all federally recognized eligibility classes that apply to you. Some selections indicate possible set-aside codes.
- Performance States – Narrows grants by state(s).
- Agency – Select public agencies that frequently offer grants in your field of interest.

**\*IMPORTANT\***

Once you have made the desired changes, click Update at the bottom of the screen. If you do not click the Update icon, the changes will not be saved. To verify that your changes are accepted, please scroll to the top of the page and find a message stating the profile “*was successfully updated.*”



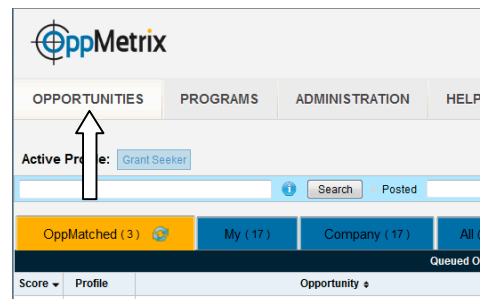
**Opportunities**

**Operating the Match System**

Once you have created a profile, the Opportunities section offers several options for the type of match to perform. The funding sources in this section include both Federal Grants and Texas Department of State Health Services Grants. (Note: Please see “Programs” section below for information about private foundation grants.)

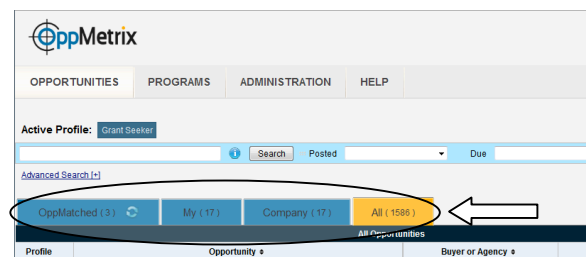
To start:

- Select Opportunities at the top of the page.



Three main fields from which to select.

- OppMatched – By clicking on this icon, you engage the OppMatch matching capability. The system then matches the best available federal grant solicitations to your profile. A ranked list – of grant notices and similar notices – appears in the main field. This is the most common use of the system.

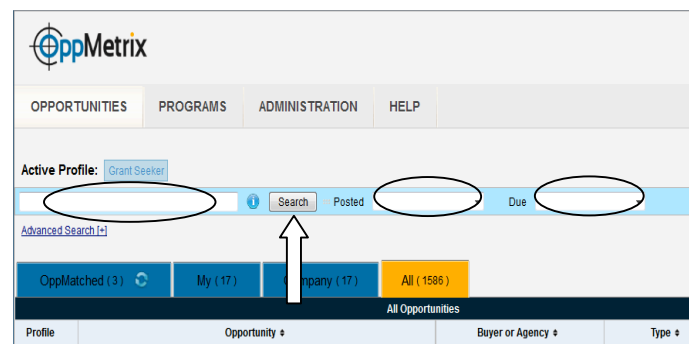


- My – By clicking this icon, you see a list of all active opportunities that you have selected as good matches during previous matching efforts. These opportunities remain there until they are awarded or pass the due date. Then they are moved to an Archive.
- All – By clicking this icon, you retrieve all grant opportunities that are available in the system at that time, unfiltered by your profile, and without matching functionality.

### Search and Advanced Search

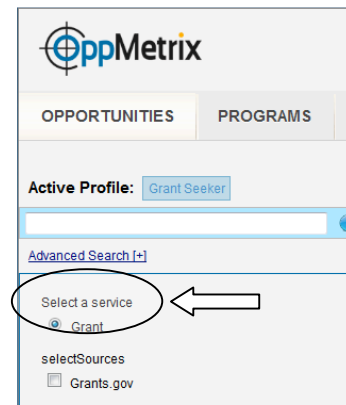
Not all grants in the system have matching functionality available, depending on the source. However, all grants and all sections can be sorted with the Search and Advanced Search functions.

With the Search function, users plug in keywords and generate a list of search results from that section that feature those keywords. The search can be narrowed by selecting a time frame for the posted date of the opportunity or the due date, or both.



Advanced Search offers more opportunities for narrowing the search. The results can be narrowed by the main profile categories – Select Sources, Funding Categories, Eligibility, and Agency. They can also be narrowed by choosing a funding instrument, active vs. archived, or a distance radius.

An icon at the top lets you select the type of service. If you make a mistake select the Clear All icon.



### Thumbs-Up/Thumbs Down

The thumbs-up/thumbs-down feature in the profile column is one of the most important. For good opportunities, select thumbs-up. For unwanted opportunities, select thumbs down. This feedback provides the system with a better idea of your preferences. Over time it creates stronger matches. This is adaptive learning.

### Adaptive Learning

The system includes an Adaptive Learning capability. Adaptive Learning is an “artificial intelligence” function that learns your preferences over time through the selections that that you make. The function then analyzes those selections and uses them to bring you stronger matches in the future.

In the OppMatch system, Adaptive Learning works with a simple thumbs-up/thumbs-down icon system. These icons appear on the Detail Page as well as the Table Summary. If the entry is the type of grant that interests you, select the thumbs-up icon. If the entry is not the type of grant that interests you, then select the thumbs-down icon. The system will analyze and calculate this feedback to bring you stronger matches in the future.

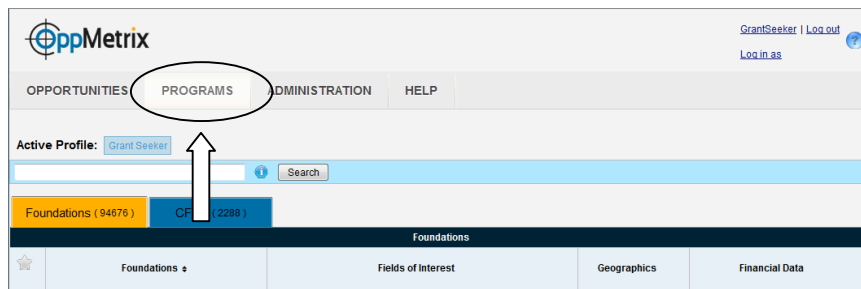
### Search vs. Match

To understand the benefit of the OppMatch system, it is important to distinguish between the concepts of search and match. Search is the traditional method of locating information on the Internet. The user enters keywords into a search engine. The search engine produces a list of results that contain those keywords. That's search.

Match is different. Users create and save a “magnetic” profile built with selected criteria and submitted information (websites, articles, papers, etc.). Using a matching algorithm, the system then matches items found in a database to the profile. The system assigns scores and generates a ranked list. This function is known as a “recommendation engine.”

### Programs

The Programs section of the OppMatch system brings a wide variety of foundation grant opportunities and Catalog of Federal Domestic Assistance (CFDA) programs.



### Foundations

The OppMetrix Foundation Grants Database collects tens of thousands of grant opportunities from across the Internet and places them in a single database. Currently, the foundation database does not operate with matching functionality. Users can, however, use the Search and Advanced Search functions to sort through opportunities suited for research. Users can tag and track certain foundations of interest by clicking the Star icon, thereby adding it to a saved watch list.

### Send to a Friend

Sometimes you see an opportunity that isn't right for you but is right for a friend. To send a profile of a grant program to a friend, click on the share icon near the top right of the page. A popup box will appear. It will ask you to fill in your Associate Name and Associate's Email for your friend. Choose Send or Reset. A PDF will go through. This will protect the information that you are sending.

## **Help**

First, if you have a question about the system, you can send a Support Email. Click on Help on the top line. Then click the Send Support Email link. Fill out your name, email address and question and click the Send icon. Your question will be answered as soon as possible.

The Blue Question Mark icon also produces an email box that you can send for support. If you have questions or suggestions, fill out the field and click Submit.